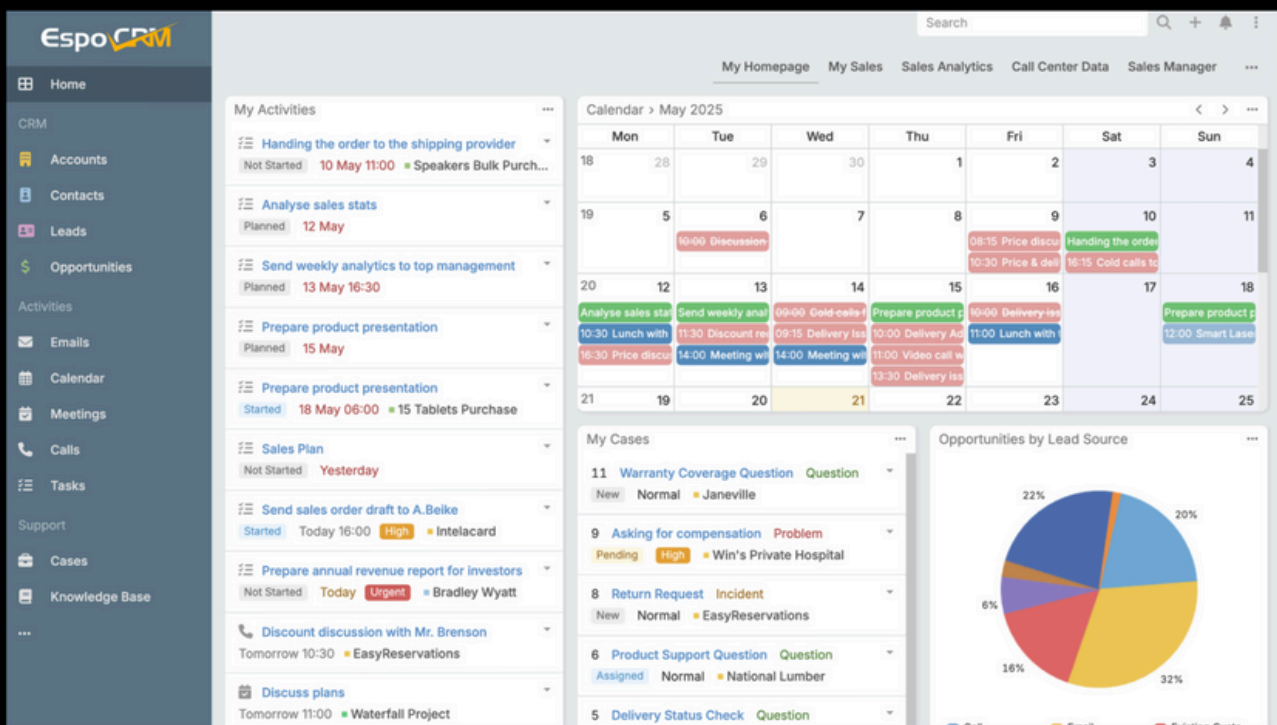# What is Espo?

EspoCRM manages every aspect of your business, from sales and client relationships, to marketing and customer service.

It provides the flexibility to go as simple or as complex as you need. It's designed with Small-to-Medium businesses in mind, but no business is too big for EspoCRM.

User-friendly interface

EspoCRM's tabbed layout is ideal for all users, offering an intuitive navigation experience that enhances both efficiency and productivity.

✅ Clean, intuitive interface

✅ Highly customisable layout

✅ Choose from multiple themes

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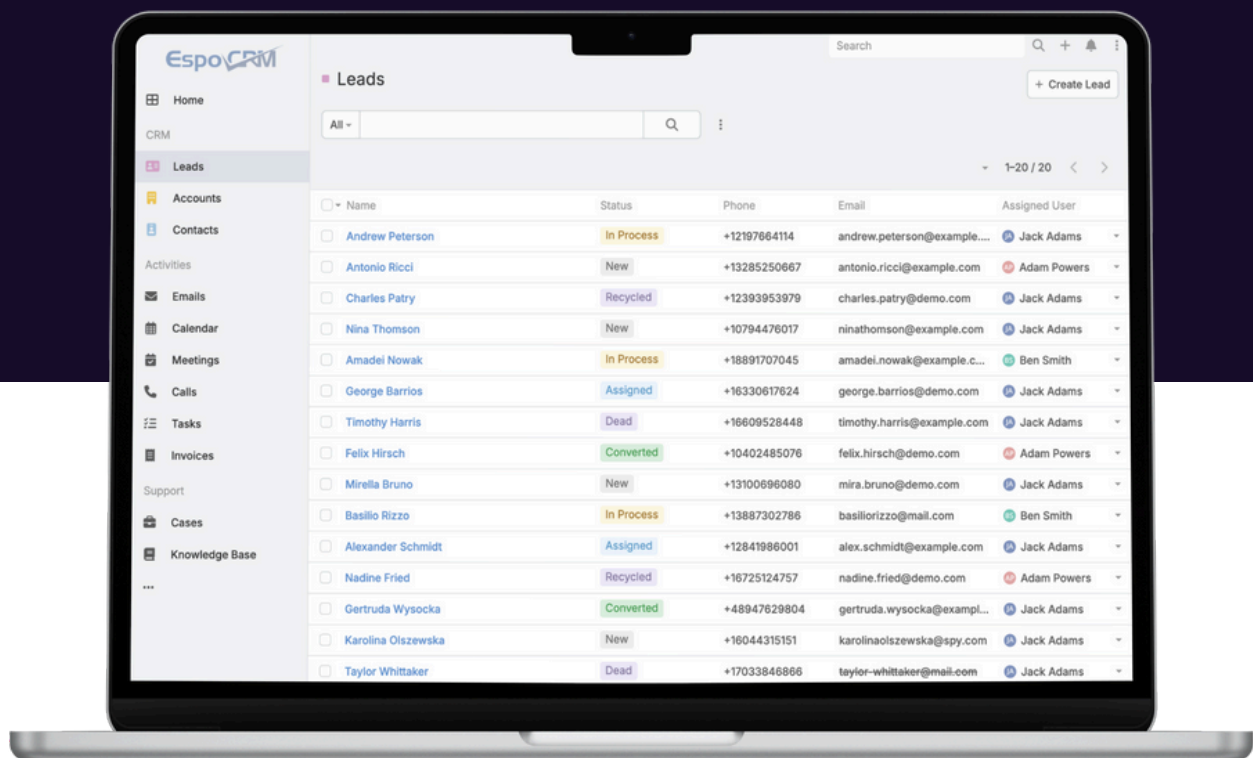
EspoCRM

Sales Automation

Effortlessly turn your leads into opportunities, contacts, and accounts, complete with related records and automated guides. EspoCRM empowers your sales team with all the essential tools they need to succeed.

- ✓ Manage all your record's contact details in one place.

- ✓ Stay up to date with your record's changes and updates with Activity Stream.

- ✓ See past and upcoming activities related to the record.
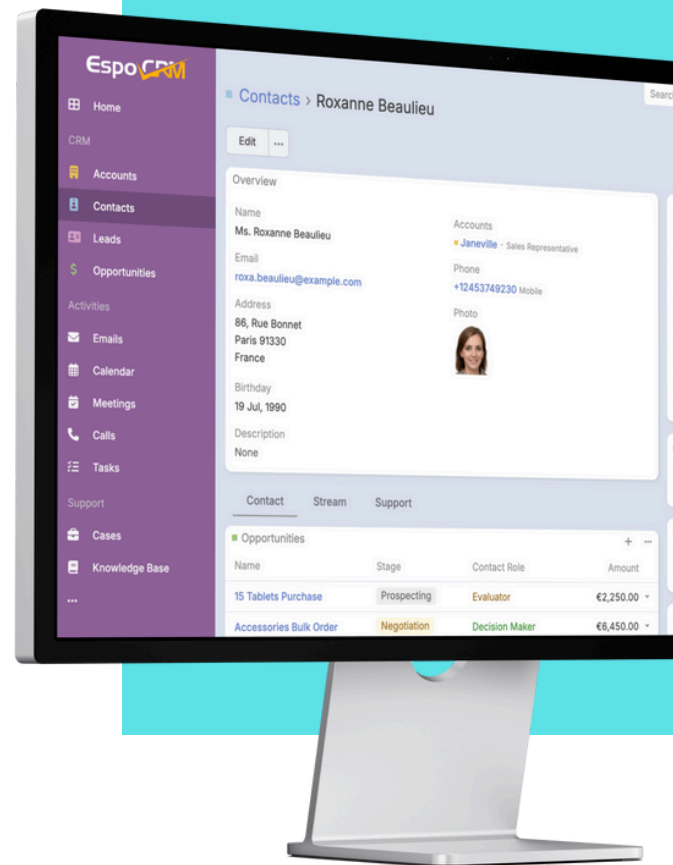
Calendar

Manage all your meetings, calls, and tasks with the Calendar module.

- ✓ Send invitations to users, leads, and contacts.

- ✓ See the schedules of your coworkers in one calendar with the Shared Calendar feature.

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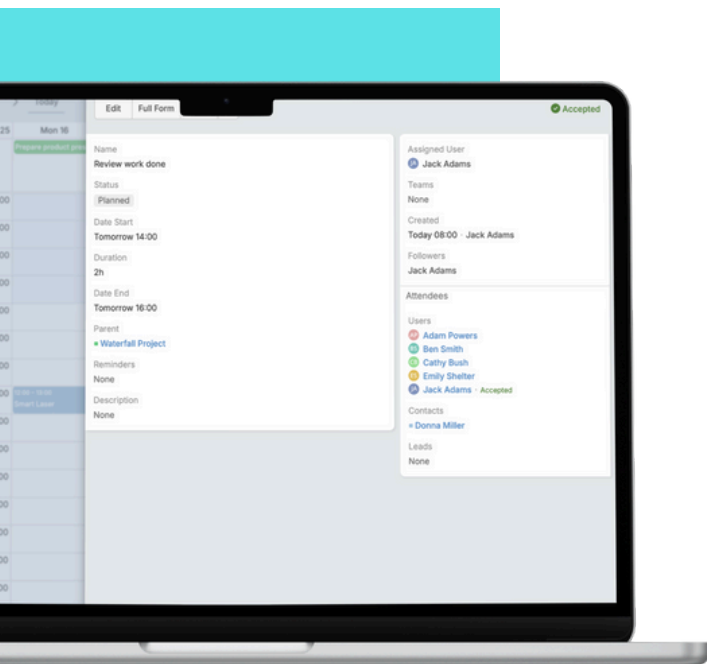
EspoCRM

Emails

Manage your emails seamlessly within EspoCRM by composing, sending, and receiving messages directly from your personal or group email accounts, all while automatically archiving them. Enjoy many features including:

- ✅ **Personalised Email Signatures**
- ✅ **Custom Templates**
- ✅ **Mass Emails**
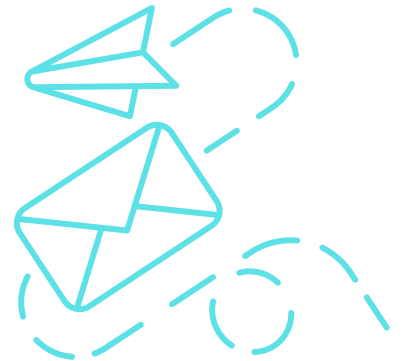
Integrations

Seamlessly connect both Outlook and Google to EspoCRM for synchronised calendars and inboxes. Manage your calls and meetings in both Google or Outlook and in your EspoCRM Calendar.
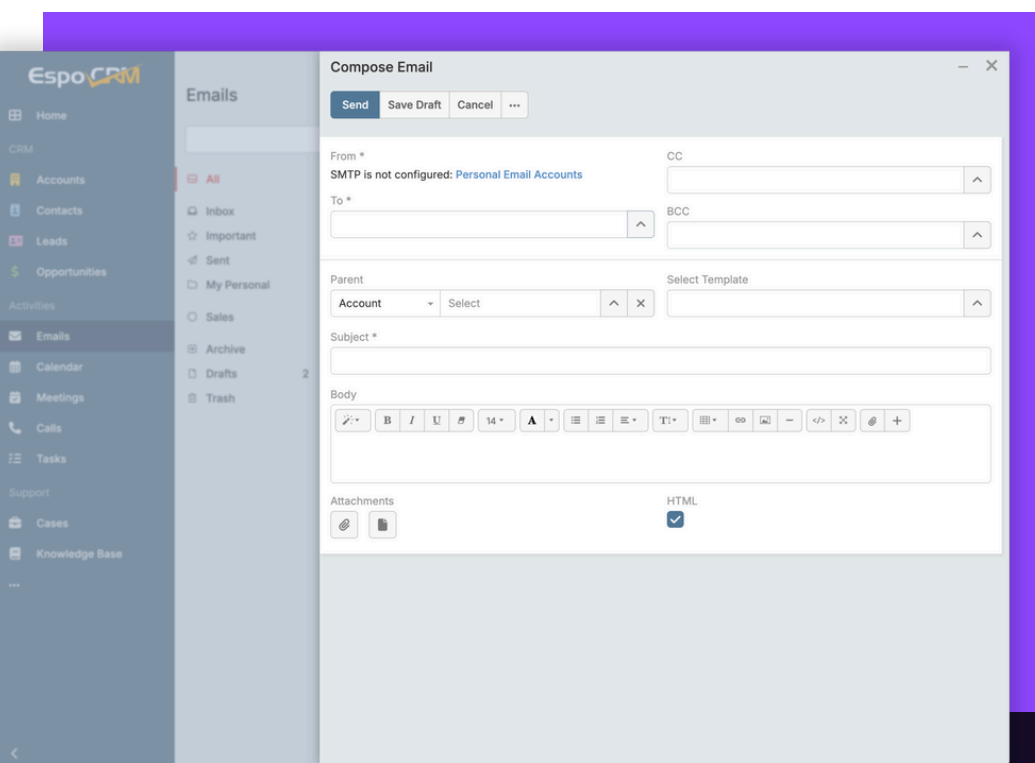
Customer Support

Customer service and helpdesk inquiries are integrated into an intuitive system that streamlines the management of all customer interactions.

This system connects to every contact in your CRM, ensuring that locating any case or inquiry is just a few clicks away.

Email-to-case

Email-to-Case enables the automatic creation of cases from incoming group emails. This feature is incredibly beneficial for support teams, as it minimises the time spent on routine manual data entry.

Customer portal

The Customer Portal enables the launch of a self-service support platform. This allows you to grant customers or partners access to specific data and functionalities. There is no limit to the number of portals that can be created, so you can establish multiple portals tailored for various purposes, each with distinct data access settings.

EspoCRM

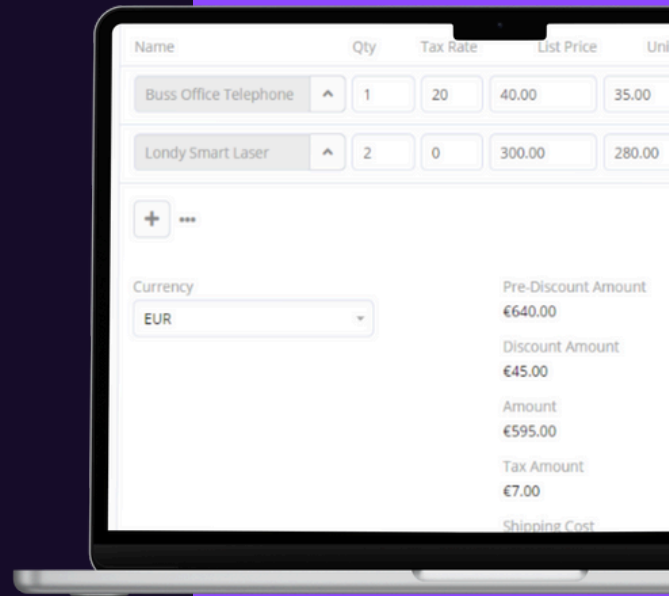**Username**

PortalUserName

Password

Login   Forgot Password?

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Quotes, Sales Orders, and Invoices

Quoting has never been easier with EspoCRM's extensive CPQ system that includes dynamic price lists and quote creation.

Convert your Quotes into Sales Orders and Invoices with just a few clicks.

Name		Qty	Tax Rate	List Price	Uni
Buss Office Telephone	˄	1	20	40.00	35.00
Londy Smart Laser	˄	2	0	300.00	280.00

+ ...

Currency
EUR

Pre-Discount Amount
€640.00

Discount Amount
€45.00

Amount
€595.00

Tax Amount
€7.00

Shipping Cost

Quote ----- **Sales Order** ---- **Invoice** - - - -

Workflows

◇ Gateways ▾   ☐ Activities ▾   →   ⌫

New → Create tasks → ◇ → Success
Create tasks → ⏱ 7 days → Manual check
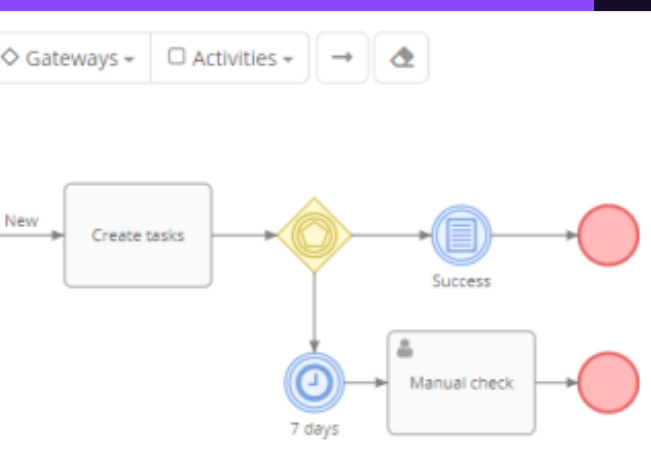
Utilise the straightforward yet powerful flowchart system to automate processes in EspoCRM.

Transform these flowcharts into comprehensive workflows to ensure you have complete control over your processes.

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EspoCRM

Inventory Management

The Inventory Management feature enables you to monitor product quantities, their locations within warehouses, transfers between different warehouses, and maintain a history of purchases and sales. It also ensures that you can confirm product availability before making a sale to a customer.
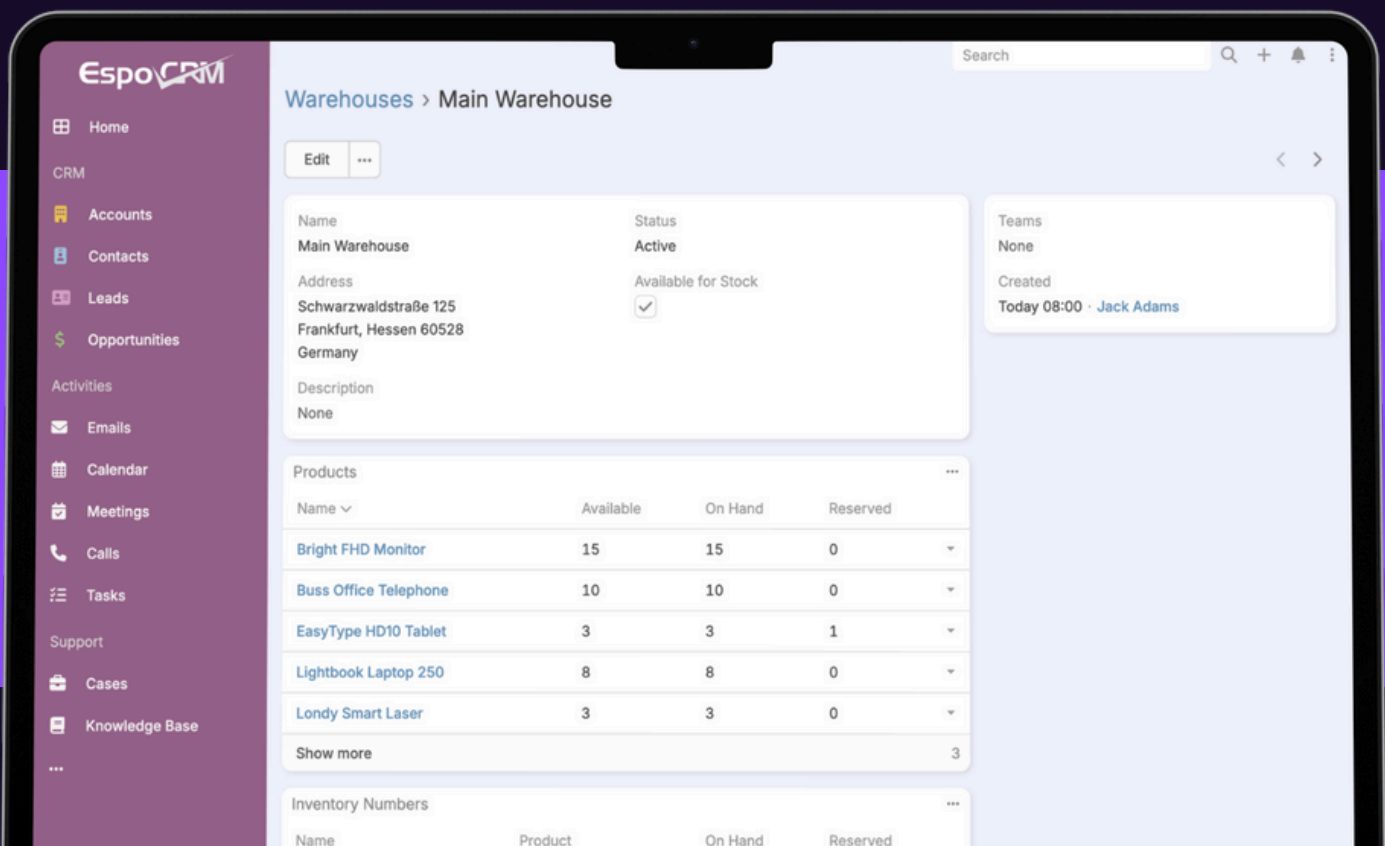

✓ Move inventory between Warehouses with Transfer Orders.

✓ Assign Serial and Batch numbers to your inventory

✓ See your inventory's history from the Inventory Number detail view.

EspoCRM

Warehouses › Main Warehouse

Edit ...

Name	Status	Teams
Main Warehouse	Active	None
Address	Available for Stock	Created
Schwarzwaldstraße 125	✓	Today 08:00 · Jack Adams
Frankfurt, Hessen 60528		
Germany		
Description		
None		

Home

CRM
- Accounts
- Contacts
- Leads
- $ Opportunities

Activities
- Emails
- Calendar
- Meetings
- Calls
- Tasks

Support
- Cases
- Knowledge Base

Products

Name ∨	Available	On Hand	Reserved	
Bright FHD Monitor	15	15	0	
Buss Office Telephone	10	10	0	
EasyType HD10 Tablet	3	3	1	
Lightbook Laptop 250	8	8	0	
Londy Smart Laser	3	3	0	
Show more				3

Inventory Numbers

Name	Product	On Hand	Reserved

Project Management

Oversee your projects from initiation to completion using EspoCRM's integrated project management system, which is designed to align with every aspect of the CRM.

Whether you're working on waterfall or agile projects, you can easily create templates for recurring project structures in just a few clicks.
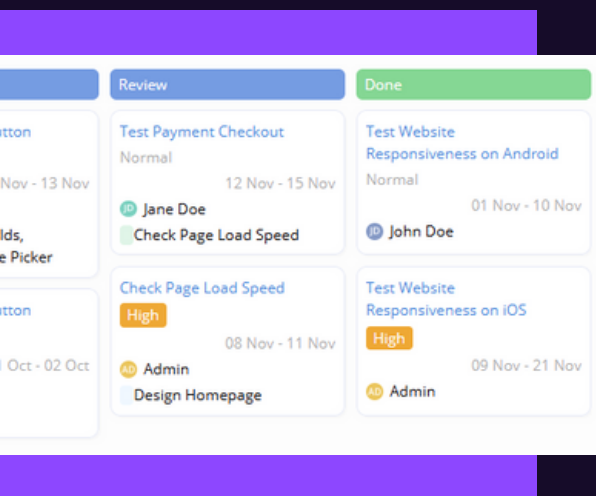
Project Boards

The Project Board offers a Kanban-style layout where tasks are represented as cards and organised into columns that reflect various stages of progress. This setup enables you to view the current status of all tasks within a group and easily update their statuses by dragging and dropping them between columns.

Gantt Chart

Gantt Charts provide a detailed timeline view of your project. This tool highlights all the important steps in the Project, so you can quickly see all Tasks, Milestones, and Task Dependencies and understand the sequence in which Tasks need to be completed.

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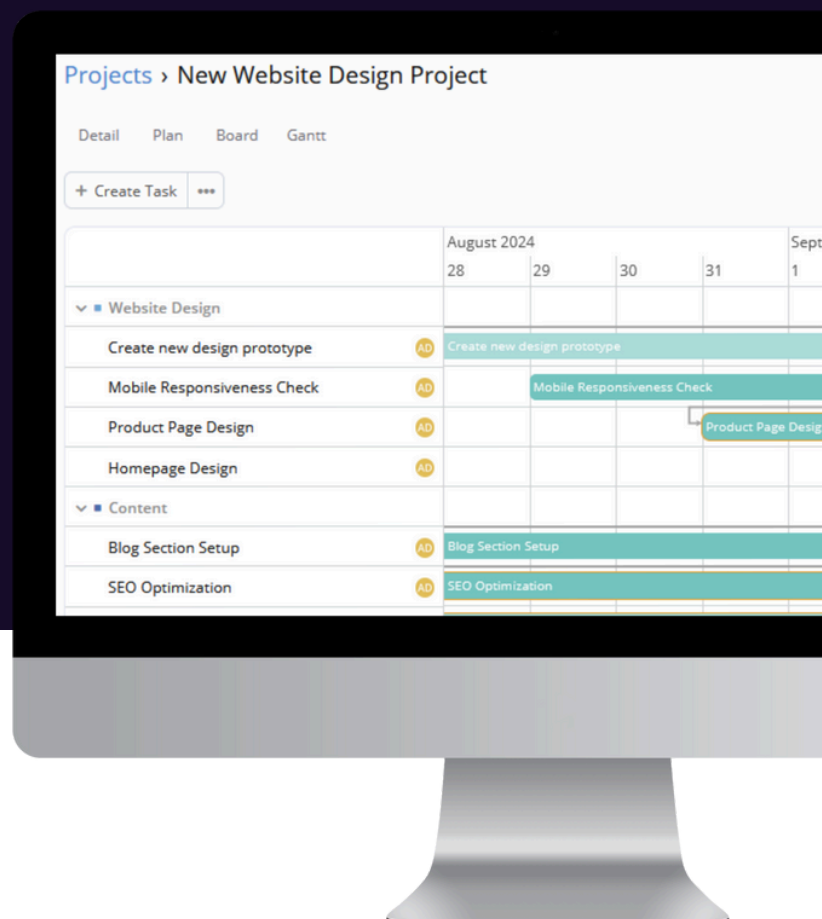
Marketing Campaigns

Campaigns serve as a powerful tool for creating and managing various marketing initiatives, such as email, newsletters, web promotions, radio spots, television ads, and direct mail campaigns. This feature enables businesses to monitor the status of their campaigns, establish budgets, and define start and end dates.

Mass Email Marketing

Mass Email Marketing can be used to create, manage, and monitor the effectiveness of email marketing campaigns. The feature allows businesses to configure bulk email sending to a large number of leads, accounts and contacts at once.

- ✓ **Email Scheduling**
- ✓ **Tracking Links**
- ✓ **Opt-out Links**
- ✓ **Segmented Target Lists**

Web-to-Lead

Web-to-Lead enables the creation of a web form to capture information about website visitors, saving this information as new leads in the CRM. The system can then be configured to assign the newly created lead to the appropriate sales teams.

The feature also allows businesses to set a double opt-in confirmation for new leads, meaning that the captured leads will need to confirm their subscription for marketing emails by clicking the opt-in link in the automatically sent email.

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EspoCRM
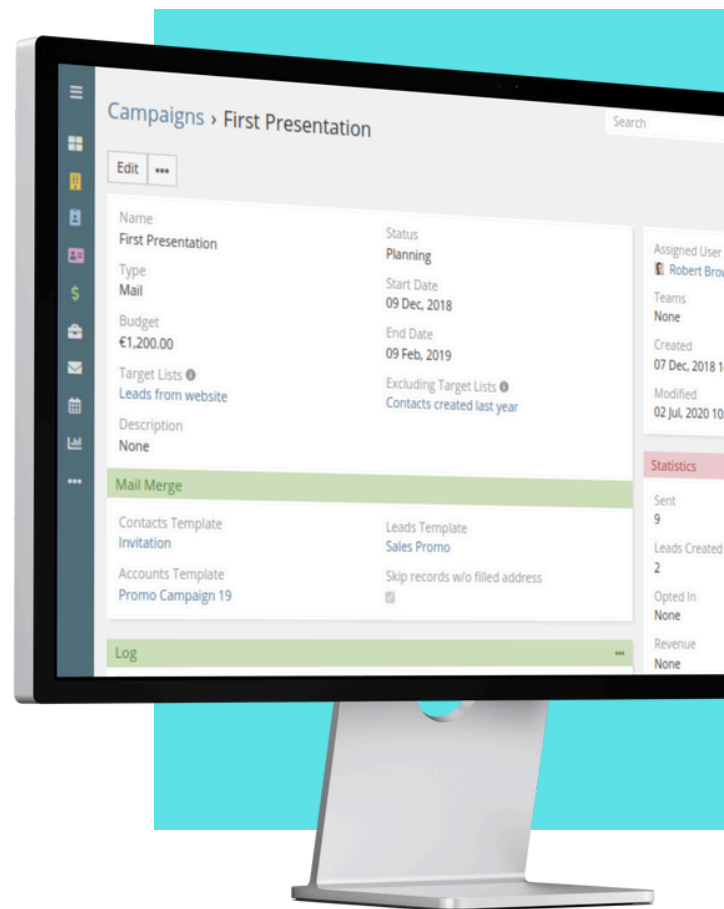
enable Cloud Deployment

Our fully GDPR-compliant, ISO-certified UK data centres offer security and reliability for your solution. We've successfully maintained 99.9% uptime for over 15 years. With our robust infrastructure, you can trust that your data is safeguarded with the highest standards.

Advanced Security

Security is our top priority at enable.services. Our data centres are protected by multi-layered security protocols, including 24/7 monitoring, advanced firewall solutions, and regular vulnerability assessments.
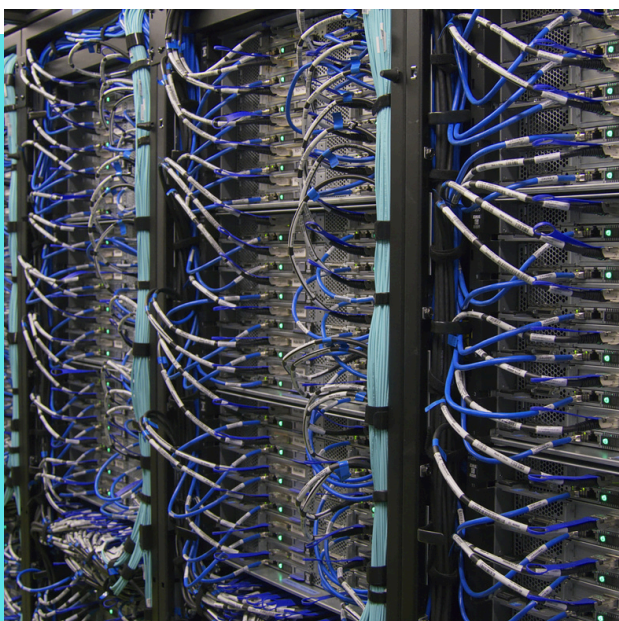
Disaster Recovery

Comprehensive disaster recovery services are included, featuring automated backups, data replication, and rapid failover capabilities to ensure your data remains safe and quickly recoverable in the event of an incident.

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EspoCRM

UK-Based Support

Think of enable.services as an extension of your team, here to help with any Espo questions or issues. We are available from 07:30 to 18:00, Monday to Friday, via phone, email, or video call.

Our prioritisation system enables our engineers to ensure that cases are worked on efficiently and effectively. This means that, on the rare occasion that an issue prevents your business from operating as usual, our support team will make it their top priority to resolve it as a matter of urgency.

We aim to respond to and resolve support cases as quickly as possible.

In addition to being able to open support cases via email or phone call, customers can use enable's customer portal to open new support cases.

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SLAs

We know your time is precious, and so we aim to get you back to business as soon as possible. Our case priority system and service-level agreements allow us to keep a structured approach to supporting your EspoCRM platform.

Priority	Description	SLA
Priority 1	**System is completely down or multiple core functions are not working as expected**	**1 Business Hour**
Priority 2	**System is generally up and functioning, but a key part of business functionality is down**	**24 Business Hours**
Priority 3	**General system issue which does not have a high impact on functionality**	**5 Business Days**
Priority 4	**General questions or other non-production related issues**	**10 Business Days**

EspoCRM Lite

Core CRM

- ✓ **Dashboards**
- ✓ **Leads**
- ✓ **Contacts**
- ✓ **Accounts**
- ✓ **Opportunities**

Activities

- ✓ **Calendar**
- ✓ **Calls / Meetings / Tasks / Emails**
- ✓ **Stream**
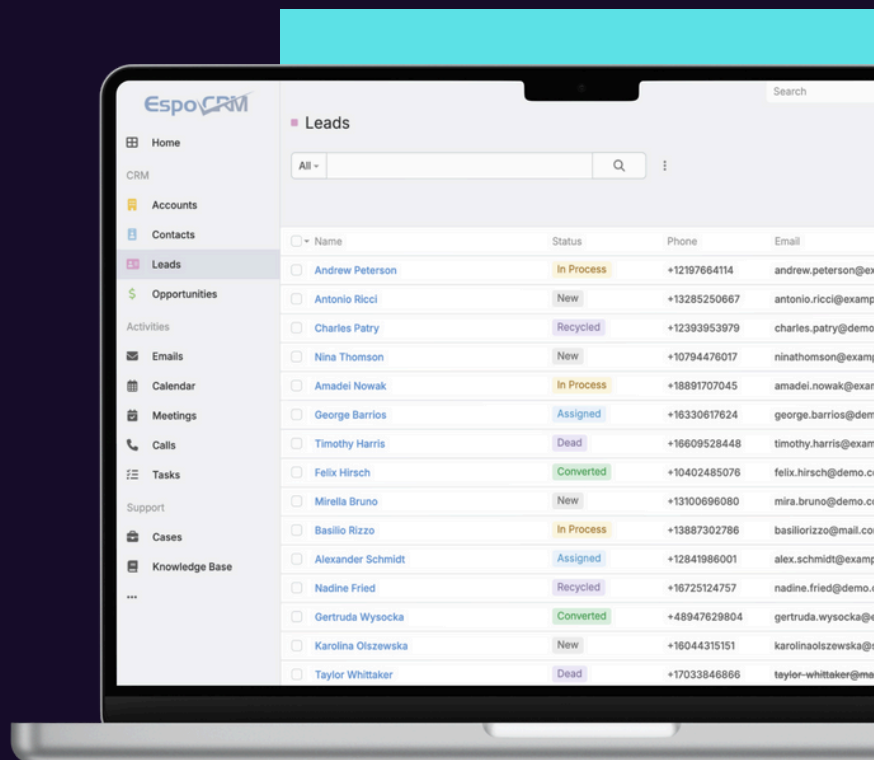- ✓ **Documents**

Customer service

- ✓ **Cases**
- ✓ **Knowledge base**

Marketing

- ✓ **Target lists**
- ✓ **Campaigns**
- ✓ **Documents**

Technical Assurance

- ✓ **UK Tier 3 Data Centres**
- ✓ **UK Support**

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EspoCRM

EspoCRM Standard

Enhance the Lite edition with advanced automation and integration capabilities.

Automations

- ✓ **Flowcharts**
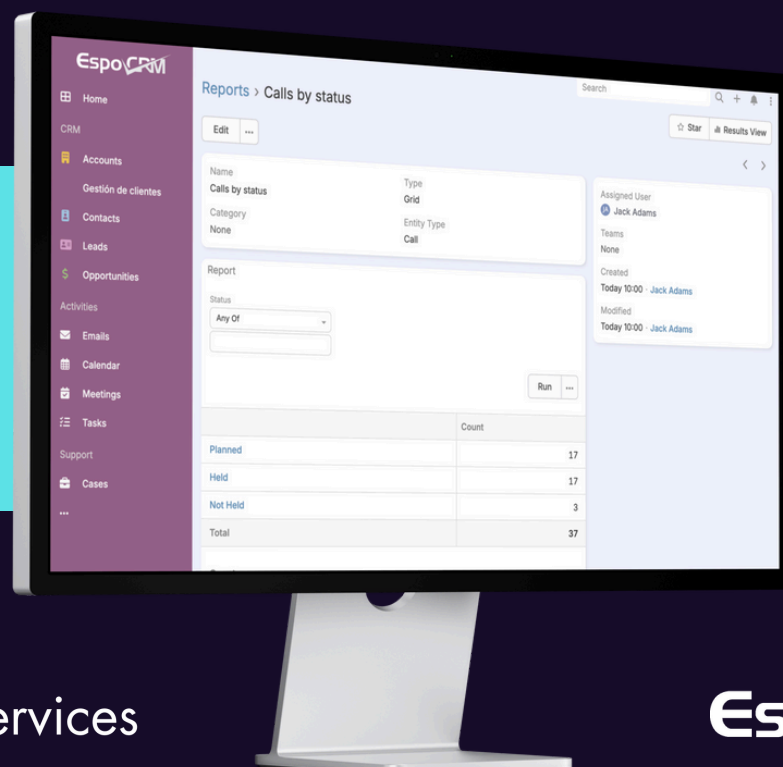- ✓ **Workflows**
- ✓ **Processes**

Analytics

- ✓ **Reports**
- ✓ **KPIs**

Integrations

- ✓ **Outlook / Google calendar sync**
- ✓ **Rest API**
- ✓ **Zapier / Make.com / enableFlow automations**

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EspoCRM

EspoCRM Advanced

Enhance the Standard edition with advanced sales, purchasing, and project management capabilities.

Sales & Purchasing

- ✅ **Quotes**
- ✅ **Product Management**
- ✅ **Sales Orders**
- ✅ **Invoices**
- ✅ **Delivery Orders**
- ✅ **Return Orders**
- ✅ **Purchase Orders**
- ✅ **Receipt Orders**
- ✅ **Transer Orders**
- ✅ **Inventory Management**
- ✅ **Warehouse/location management**

Project management

- ✅ **Projects**
- ✅ **Project tasks**
- ✅ **Gantt Charts**

MailChimp Integration

- ✅ **Target List Sync**
- ✅ **Viewing Target's Activity**

Customer service

- ✅ **Portals**

*Pricing is based on a twelve (12) month contractual commitment. Although fees are calculated on a per user, per month basis, charges are invoiced quarterly and payable monthly throughout the duration of the annual term.

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EspoCRM